**CGIAR Research Program on
Climate Change, Agriculture and Food Security (CCAFS)**

DDS Organisation
Video Transcript

October 2013

Introduction

Towards the end of the DDS Introduction video we briefly mentioned the challenges of organising the store and in this video we give some suggestions as to folder structure and naming of files.

Organising a data and document store is really no different to organising files and folders on your own PC. However, it is generally used by several individuals so it's a good idea to establish a structure and naming convention at least for the top level folders and files.

Example File Structure

We'll start by having a look at an example file structure. This has been set up in Dropbox but could just as easily be on a shared network device or even on the hard drive of a team member.

At the top level there are 5 main folders – General documents, Common database, then 3 folders to reflect the 3 research areas of the project. You will notice that we have included a number at the start of the folder name. This effectively gives you control over the sort order for your folders and would recommend this for the top level folders.

The general documents folder contains the project proposal, the log frame, theory of change, reports, etc. These are all documents for the project as a whole.

The folders for the research areas each contain sub-folders and where there are elements expected from each research area we have included sub-folders with the same names. For example each of our research areas have sub-folders for protocols, tools, photos and reports. Each also has a database folder for the data from that particular research area. These folders have slightly different names but all include the word "database" in the name and all have the same numeric prefix making it easy to find the data.

The common database folder at the top level would contain data relevant to the project as a whole such as farmer demographic data.

If we go into research tools we have data recording sheets, field presentations, manuals and questionnaires.

We have divided reports into monthly reports, MSc theses, PowerPoint presentations for workshops and published papers. We stress again that this is just an example structure – you and your team should develop your own structure that suits your needs.

Files Names

To consider file names we will look at files in the General Documents folder. It is important to give your files meaningful names. The filenames shown here are examples of what we mean; the names clearly indicate what we will find in each file. You'll notice we also have included a string of 8 digits at the end of each filename. This represents the date – 4 digits for the year, 2 for the month and 2 for the day. Thus the project proposal was produced on 12th June 2009.

You'll also notice there are 2 Theory of Change documents. The first is dated 30th January 2010 and the second one 23rd March 2010. Some people like to keep previous versions of documents like this and with this method of naming the files you can easily see which is the most up to date. Don't rely on the Date Modified as this sometimes picks up the date a file was moved or copied and you can

see in this example, this is no help at all to us. Also if you have any Access databases for example, the date modified changes whenever you open the database file regardless of whether or not you make any changes.

Such naming conventions may seem either obvious or superfluous even but before we move on let's see an example of what can happen if naming conventions are not established and agreed on by the whole team.

In this folder, the files are all different versions of a document on presenting results, but it is far from clear which version is the most up to date or whether there is any reason for so many versions.

Where to store your DDS

Where you store your DDS depends on the resources and local skills you have available. The simplest solution is to have a shared network drive to which all team members have access. In the SSC we have a network storage device with several shared folders to which staff have different access levels.

Another option is to use something like Dropbox as we have demonstrated in this video. This is a service that allows you to store and access your files from anywhere and to share them with anyone you choose. There are numerous cloud storage systems available and if your team are widely dispersed it would be worthwhile investigated the different options.

Sorting the mess

It is much easier to set up good structures from the outset – but of course this often doesn't happen and you find yourself with a mess, and a mess is hard to organise. Here's a suggestion – ignore the mess for now, shut the door on it, we'll call it a backlog. Now set up your structures and systems as though you were starting from scratch – any incoming documents and data files can go immediately into the new structure you have. Once your new system is working, perhaps after a few tweaks – it's time to return to your backlog. Spend a little time each day moving items from your backlog into your new system – even just a few minutes. With all new items going directly into your new system your backlog can only get smaller until it disappears all together.

Summary

The data and document store is a system to help you keep all your project files together in a central location. A well-organised DDS means that team members can always access the latest documents and data and data integrity is preserved. Archiving at the end of the project is made easier and quicker.

As we said the examples and suggestions we've shown here are not hard and fast rules for organising your DDS. You may have alternative structures and systems that work for you and your team. Whatever structure you choose it should be agreed by the whole team so that everyone knows where to store information and how to find it again.

But remember, there is no special software involved and there is certainly no magic wand to organise your files. As a team you must decide on the structure of your DDS and ensure it becomes a useful resource and not just a file dump.

Appendix I – CCAFS Data Management Support Pack

This document is part of the CCAFS Data Management Support Pack produced by the Statistical Services Centre, University of Reading, UK. The following materials are available in the pack:

0. Data Management Strategy
    a. CCAFS Data Management Strategy
1. Research Protocols
    a. Writing Research Protocols – a statistical perspective
    b. Preparation of Research Protocols – Good Practice Case Study
    c. What is a Research Protocol, and how to use one (Video & Transcript)
    d. Details of what a Research Protocol should contain (Video & Transcript)
2. Data Management Policies & Plans
    a. Creating a Data Management Plan
    b. Data Management Plan (Video & Transcript)
    c. Example Data Management Activity Plan
    d. Example Consent Form
3. Budgeting & Planning
    a. Budgeting & Planning for Data Management
    b. ToR Data Support Staff
    c. Budgeting & Planning (Video & Transcript)
4. Data Ownership
    a. Data Ownership and Authorship
    b. Template – Data Ownership Agreement
    c. CCAFS Data Ownership & Sharing Agreement
    d. Data Ownership & Authorship (Video & Transcript)
5. Data & Document Storage
    a. Creating and Using a DDS
    b. DDS Introduction – (Video & Transcript)
    c. DDS Organisation – (Video & Transcript)
    d. DDS Ownership – (Video & Transcript)
    e. Introduction to Dropbox – (Video & Transcript)
6. Archiving & Sharing
    a. Archiving & Sharing Data
    b. Data and Documents to Submit for Archiving – a checklist
    c. MetaData
    d. Archiving & Sharing (Video & Transcript)
    e. Metadata (Video & Transcript)
    f. CCAFS HBS Questionnaire
    g. CCAFS HHS Code Book
    h. CCAFS Training Manual for Field Supervisors

7. CCAFS Data Portals
    a. Portals for CCAFS Outputs
    b. AgTrials Summary
    c. CCAFS-Climate Summary
    d. DSpace Introduction
    e. Introduction to Dataverse (Video & Transcript)
    f. Creating a Dataverse (Video & Transcript)
    g. Dataverse Study Catalogue
    h. CCAFS Dataverse (Video & Transcript)
8. Data Quality & Organisation
    a. Data Quality Assurance
    b. Guidance for handling different types of Data
    c. Transition from Raw to Primary Data
    d. Data Quality Assurance (Video & Transcript)
    e. Guidance for handling different types of data (Video & Transcript)
    f. Transition from Raw to Primary Data (Video & Transcript)